



### **Community Outreach, Support, and Feedback**

Combining concepts from prior initiatives (e.g. Project EASI) and an analysis of the current delivery processes, SFA and the Modernization Partner identified a need for a Common Origination and Disbursement (COD) process. SFA and the Modernization Partner recognized that there is enough commonality represented in the delivery of Pell Grants, Direct Loans and Campus-Based Programs to warrant a single process. In addition to the benefits related to a single process, COD is critical to achieving an enterprise-wide solution that will provide real-time data to students, schools, and financial partners via web portals and other enabling technologies.

During Phase I and the beginning of Phase II of COD, the Modernization Partner worked with Student Financial Assistance (SFA) to develop a conceptual design for a streamlined, transaction-based payment method for schools. As we jointly move forward in developing detailed requirements and an implementation plan, there exists a critical need for the financial aid community, as well as other internal and external stakeholders, to be well informed on the necessary steps required to make COD a reality. In addition, it is both important and appropriate to solicit input and guidance from our school partners, some of whom may be implementing COD as early as the 2002-03 award year.

In conjunction with SFA, the Modernization Partner has identified several mechanisms by which to communicate to and solicit feedback from school stakeholders<sup>1</sup>. These include:

- A. Conferences – support the Schools Channel General Manager in developing presentations for professional conferences and meetings
- B. Working Groups – facilitate working group discussions about COD at professional conferences and meetings
- C. E-Newsletters – develop and transmit e-newsletters providing updated information about COD to the User Steering Committee and internal SFA stakeholders

This deliverable provides a summary to date of the Modernization Partner activities in support of SFA's efforts to reach out to key external stakeholders, as well as plans for support moving forward through the completion of COD implementation planning.

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<sup>1</sup> The task order refers to the preparation for and facilitation of Joint Application and Development (JAD) Sessions by the Modernization Partner in support of SFA. The inclusion of JAD Sessions assumed that a strategic business partner would be in place and an enabling technology identified. However, the time-line for partner and technology selection has been extended. Therefore, scheduling of JAD Sessions is premature at this time.



## **ACTIVITIES TO DATE**

### **A) Conference Support**

The Modernization Partner provided support in presentation development and, in some cases, on-site assistance and observation, for the following conferences:

<b>Conference</b>	<b>Date</b>	<b>Appendix</b>
NASFAA Executive Board*	4/29/00	A-1
MASFAA Leadership Conference*	5/18/2000	A-2
Tribal Colleges & Universities	6/5/2000	A-3
NCHELP General Conference	6/6/2000	A-4
NCHELP Leadership Conference*	9/14/2000	A-5

\* - on-site assistance and observation provided

### **B) Working Groups**

- 1) The Modernization Partner provided support in preparing for and facilitating a workgroup at the following conference:

<b>Conference</b>	<b>Date</b>	<b>Appendix</b>
MASFAA Leadership Conference	5/18/2000	B-1

- 2) User Steering Committee

An integral part of the comprehensive outreach plan involves the creation of a User Steering Committee, consisting of approximately twenty (20) Title IV institutions representing all sectors of post-secondary. This Committee will be a more consistent “working group”, acting as a sounding board on COD issues related to the implementation of business processes and the mitigation of challenges to schools. Third Party Servicers will also be represented in this Committee.

The Modernization Partner issued invitations to prospective participants on 9/21/2000. Follow-up and “gap fitting” of schools will take place as needed. The Modernization Partner anticipates that many of the schools represented in the User Steering Committee will also become members of a larger group of institutions that will implement COD during the 2002-03 award year. Please refer to the Phase-In School Approach Deliverable, 19.1.8, for additional information.

In addition to the above-listed working groups, a group of schools was convened in November and December of 1999 to review and discuss the initial COD conceptual. For reference, the comments compiled during these two sessions are included as Appendix B-2.

### **C) E-Newsletters**

No activity to date.



## **PLANS MOVING FORWARD**

### **A) Conference Support**

The Modernization Partner will provide strategic support to SFA during the conferences listed below. In addition to developing the presentation for the General Manager of the Schools Channel, the Modernization Partner will:

- Provide on-site assistance and observation;
- Collect feedback from attendees on critical business issues; and
- Maintain all presentations and retain relevant data.

<b>Conference</b>	<b>Date</b>
SFA Update Videoconference	10/26/00
Electronic Access Conference, Dallas	11/13/00 – 11/15/00
Electronic Access Conference, Atlanta	11/28/00 – 11/30/00
Electronic Access Conference, Phoenix	12/12/00 – 12/14/00

In addition, the Modernization Partner may provide strategic support to SFA on selected regional and state financial aid association meetings. The timing and nature of support will be decided and agreed upon jointly by the Modernization Partner and the COD project sponsor.

### **B) Working Groups**

#### **1) Electronic Access Conferences**

The Modernization Partner will provide support in preparing for and will participate in work group sessions at the three Electronic Access Conferences listed above. In this participation, the Modernization Partner will provide COD functional and process knowledge as, as needed, will assist NACHA in their facilitation of these sessions.

#### **2) User Steering Committee**

As indicated above, the COD team is in the process of forming a User Steering Committee. Moving forward, this will be a standing working group. Please refer to the Phase-In School Approach Deliverable, 19.1.8 (Appendix C), for more detailed information related to the objectives of this group.

#### **3) Additional Working Groups**

In addition, the Modernization Partner may provide support in convening additional working groups on an ad-hoc basis. The timing and objectives of these working groups will be decided and agreed upon jointly by the Modernization Partner and the COD project sponsor.



Support for such working groups may include:

- Facilitation of the sessions;
- Collection of feedback;
- Responding to participants; and
- Maintenance of information disseminated.

#### Responses to Inquiries

For all working group sessions, the Modernization Partner will note and retain comments for future reference. In addition, the Modernization Partner will assist SFA in addressing questions raised by participants during the course of the sessions. For those questions requiring additional time to research, the Modernization Partner will track and respond via e-mail within 72 hours of the conclusion of the session.

#### Schools Challenges

A COD working group consisting of Modernization Partner and SFA identified primary challenges schools may face in successfully implementing the new process. A document has been created that chronicles these challenges in the form of deliverable 19.1.5 (Appendix D). Please refer to the deliverable for additional information relative to the objective of the COD working group.

Moving forward, the Modernization Partner will utilize working groups to expand and validate this list of challenges, as well as to discuss potential mitigation strategies and actions that could lessen the probability and/ or impact of these challenges. In conjunction with the working groups, the challenges will be reviewed and addressed by the COD Implementation Team on a rolling and timely basis.

#### C) E-Newsletters

The Modernization Partner will communicate with the User Steering Committee between meetings through the use of an electronic newsletter. The intent is to develop and “test” a vehicle for eventual use in communicating to other external stakeholders at the appropriate time.